

Not All Reforms Are Big: The Development of the Field Staff during the Root Era Reforms

A Monograph

by

MAJ Derek Drouin
United States Army



School of Advanced Military Studies
United States Army Command and General Staff College
Fort Leavenworth, Kansas

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Name of Candidate: MAJ Derek Drouin

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Approved by:

_____, Monograph Director
Thomas A. Bruscino, PhD

_____, Seminar Leader
Robert J. Hallett, LtCol

_____, Director, School of Advanced Military
Studies
Henry A. Arnold III, COL

Accepted this 21st day of May 2015 by:

_____, Director, Graduate Degree Programs
Robert F. Baumann, PhD

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Abstract

Not All Reforms Are Big: The Development of the Field Staff during the Root Era Reforms, by MAJ Derek Drouin, 49 pages.

The Spanish American War was a turning point in the history of the United States Army. While the US Army was successful in its operational mission of defeating the Spanish in Cuba, the Philippines, and Puerto Rico in 1898, it suffered from significant issues in administration, planning, and mobilization, which debilitated much of the force. The US Army and War Department were not equipped to handle the rapid mobilization of an expeditionary force due to being organized for a defense policy that emphasized a frontier constabulary and coastal defense. Despite assurances from the states to the contrary, the National Guard proved to be ill prepared for war, deficient in trained officers, men, and equipment. With the regiment as the largest peacetime formation and without a General Staff, the US Army was limited in its ability to conduct operational planning and command and control its brigades, divisions, and corps. Ultimately, the US Army fielded limited numbers of prepared regular and volunteer troops, achieving victory over the weak and isolated Spanish forces through tactical successes at battles such as San Juan Heights and Manila.

The Root era reforms highlighted the ability of the Secretary of War Elihu Root to create fundamental change within the War Department and US Army. The reforms at the turn of the twentieth century created the modern United States Army, which was intellectually prepared and possessed the systems necessary for the execution of operational art in World War I. Representing a shift from the US Army's focus at the tactical level of war and towards early operational art, using force to achieve strategic objectives, through the arrangement of tactical actions in time, space, and purpose, the US Army improved its educational system, its management of field units, its doctrine, and began planning for contingency operations against potential adversaries. The US Army can look upon the Root era reforms as a model for implementing the lessons learned following war. It served as an opportunity for a thorough self-examination, reform, and postured the US Army to fight World War I.

Contents

| | |
|--|----|
| Introduction | 1 |
| Literature Review..... | 2 |
| Methodology..... | 3 |
| Part 1. The US Army on the Eve of the Spanish American War | 3 |
| Structure | 4 |
| Missions | 6 |
| Education | 7 |
| Part 2. The Spanish American War | 9 |
| Mobilization of the Army | 10 |
| The Cuban Campaign | 12 |
| The Philippine Campaign | 17 |
| Part 3. The Root Era Reforms | 23 |
| Professionalism | 25 |
| Education | 27 |
| Management | 31 |
| Part 4. Maneuvers | 36 |
| Camp Root Maneuvers | 37 |
| The Maneuver Division | 39 |
| 2nd Division Mobilization | 41 |
| Pershing's Punitive Expedition | 42 |
| Conclusion | 43 |
| Bibliography | 46 |

Introduction

The Spanish American War was a turning point in the history of the United States Army. While the US Army was successful in its operational mission of defeating the Spanish in Cuba, the Philippines, and Puerto Rico in 1898, it suffered from significant issues in administration, planning, and mobilization, which debilitated much of the force. The US Army and War Department were not equipped to handle the rapid mobilization of an expeditionary force due to being organized for a defense policy that emphasized a frontier constabulary and coastal defense. Despite assurances from the states to the contrary, the National Guard proved to be ill prepared for war, deficient in trained officers, men, and equipment. With the regiment as the largest peacetime formation and without a General Staff, the US Army was limited in its ability to conduct operational planning and command and control its brigades, divisions, and corps. Ultimately, the US Army fielded limited numbers of prepared regular and volunteer troops, achieving victory over the weak and isolated Spanish forces through tactical successes at battles such as San Juan Hill and Manila.

The Root era reforms highlighted the ability of the Secretary of War Elihu Root to create fundamental change within the War Department and US Army. The reforms at the turn of the twentieth century created the modern United States Army, which was intellectually prepared and possessed the systems necessary for the execution of operational art in World War I. Representing a shift from the US Army's focus at the tactical level of war and towards early operational art, using force to achieve strategic objectives, through the arrangement of tactical actions in time, space, and purpose, the US Army improved its educational system, its management of field units, and began planning for contingency operations against potential adversaries. The US Army institutionalized the Root era reforms with the establishment of the General Service and Staff College, Army War College, General Staff, as well as improving the field level staffs. The US Army can look upon the Root era reforms as a model for implementing

the lessons learned following war. It served as an opportunity for a thorough self-examination, reform, and postured the US Army to fight World War I.

Literature Review

There are generally two groups of literature regarding this topic and time period. The first is derived from the primary sources and describe the narrative of events concerning the Spanish American War. This group largely focuses on the issues surrounding the mobilization of Regular, Volunteer, and National Guard forces as well as the naval and military actions in Cuba, the Philippines and Puerto Rico.¹ The second group of literature is focused on the reforms of Secretary Root and the establishment of the General Staff.² These sources lack specific depth regarding the development of the field staffs as part of the Root Era reforms, but that does not preclude them from reference in this research paper. What these, and other, sources hold is valuable information, that when collectively assembled, will illustrate the process by which Secretary of War Elihu Root and the reform minded officers of the US Army were able to

¹ Frank Freidel's book, *The Splendid Little War*, provides a general description of the events of the Spanish American War and consists of many firsthand accounts by soldiers of all ranks. Russell F. Weigley's *History of the United States Army* focuses largely on the wasteful and inefficient mobilization due to the failures of the War Department. *The War with Spain in 1898* by David Trask provides detailed descriptions of the events leading up to war and the battles in the Cuban, Puerto Rican, and Philippine Campaigns. Graham Cosmas' book, *An Army for Empire*, focuses on administrative and logistical aspects of the war. The *Report of the Commission Appointed by the President to Investigate the Conduct of the War Department in the War with Spain* (Dodge Commission Report) is principally a review on the failures of the rapid mobilization and sustainment of the volunteer army units and does not scrutinize the actions of Army commanders during the campaigns.

² Philip Jessup's two volume biography titled *Elihu Root* provides a positive, in-depth look at Elihu Root's endeavors as Secretary of War. *Modernizing the American War Department* by Daniel Beaver describes the Progressive Era reforms in transitioning the War Department from a nineteenth-century bureaucracy to a modern corporate enterprise. James Abrahamson's *America Arms for a New Century* argues that reform-minded military officers were responsible for the modernization of American military policy. James Hewes, Jr.'s book *From Root to McNamara* focuses on executive control in the administration and industrial management of the War Department. *The Regulars* by Edward Coffman centers on the managerial revolution and professionalism of educated soldiers as the reason the Army was able to modernize prior to World War II.

identify the problems which occurred during the Spanish American War and implement the lasting solutions that modernized the US Army for World War I.

Methodology

This study analyzes four aspects of the Root era by assessing the US Army prior to the Spanish American War, evaluating the events of the Cuban and Philippine Campaigns, examining the reforms enacted by Secretary Root, and understanding the effects of the reforms on operational art prior to World War I. The first period starts with the status of the US Army prior to the declaration of war by the Spanish Government on 23 April 1898 and describes the organizational structure, missions, and educational system relating to operational art. The second period begins with the Spanish American War and ends with the Dodge Commission Report in 1900. This allows the identification of the issues surrounding the mobilization of many US Army Regular, Volunteer, and National Guard units, the actions of the V Corps in Cuba, the VIII Corps in the Philippines, and the influences for reform. The third period starts with the appointment of Elihu Root as Secretary of War in 1899 and ends with the issuing of the Field Service Regulations by the US Army in 1905. This allows the description of the orders, regulations, and legal statutes enacted by the War Department and Congress. The fourth period starts with the first large scale maneuvers at Fort Riley in 1902 and ends with Pershing's Expedition in 1916 as the US Army prepared for World War I. This allows for the identification of the lasting effects and continuing shortfalls of the Root era reforms prior to World War I.

Part 1

The US Army on the Eve of the Spanish American War

The US Army on the eve of the Spanish American War was structurally hollow, remained focused on its traditional constabulary and coastal defense missions, and its educational system lagged far behind its European counterparts. The practice of operational art had largely disappeared since the end of the US Civil War and was unnecessary against the Native American

tribes on the frontier.³ The lack of permanent formations larger than a regiment, the disregard for the possibility of an expeditionary mission by War Department and Army leadership, and a low level of education and professionalism in its officer corps contributed to the issues in planning, mobilization, and execution of combat operations during the Spanish American War.

Structure

The US Army in 1897 was a shadow of its former self when compared to its strength at the conclusion of the Civil War. In 1865 the Army consisted of 446,000 men organized into 1,696 infantry regiments, 272 cavalry regiments, and seventy-eight field artillery regiments.⁴ Post war demobilization and limited budgets from Congress had reduced the regular Army to 25,000 officers and men, consisting of just twenty-five infantry, ten cavalry, and five artillery regiments.⁵ The regular Army was distributed across the nation in seventy-eight posts with the largest garrisons consisting of less than 850 soldiers.⁶ Regiments were unable to meet their minimum peacetime strength as “two companies from each infantry and cavalry regiment existed only on paper; the officers assigned to them were dispersed to teach military science at land-grant colleges and to inspect National Guard summer encampments.”⁷ In addition, regiments rarely assembled as complete units and never engaged in maneuvers like their European counterparts.⁸

³ Michael R. Matheny, *Carrying the War to the Enemy: American Operational Art to 1945* (Norman, OK: University of Oklahoma Press, 2011), 12.

⁴ Daniel R. Beaver, *Modernizing the American War Department: Change and Continuity in a Turbulent Era, 1885-1920* (Kent, OH: Kent State University Press, 2006), 8.

⁵ Graham A. Cosmas, *An Army for Empire: The United States Army in the Spanish-American War* (Columbia, MO: University of Missouri Press, 1971), 5.

⁶ Edward M. Coffman, *The Regulars: The American Army, 1898-1941* (Cambridge, MA: Belknap Press, 2004), 3.

⁷ Cosmas, *An Army for Empire*, 6.

⁸ James L. Abrahamson, *America Arms for a New Century: The Making of a Great Military Power* (New York, NY: Free Press, 1981), 7.

The National Guard, whose origins dated to the colonial militia, continued to serve as the nation's traditional second line of land defense, allowing the relatively small regular army to garrison the frontier and conduct other duties that could not be performed by citizen-soldiers in times of peace.⁹ Funded largely by the states and under the control of their respective governors, the National Guard in 1897 numbered approximately 114,000 officers and men, organized along the lines of the regular army in units of infantry, cavalry, and field artillery, with a limited number of support troops.¹⁰

Recruited from urban towns and cities, National Guard soldiers were generally white, skilled working men, and upper middle class.¹¹ Officers at the company and regimental level were elected by the men of their units. The state adjutant general offices were characterized by a bloated hierarchy of senior officers who were governors' "personal friends and political cronies."¹² Units were equipped with obsolete rifles, uniforms, and artillery pieces from the meager annual federal allotment because "few states could afford to purchase new clothing and equipment for their men."¹³ Readiness for most units was low as National Guard soldiers spent most of their time fundraising, conducting social functions, practicing close order drill in their armories. Field training at large summer encampments was often not conducted due to the cost.¹⁴

⁹ John McAuley Palmer, *America in Arms: The Experience of the United States with Military Organization* (New Haven, CT: Yale University Press, 1941), 7.

¹⁰ Cosmas, *An Army for Empire*, 10-11.

¹¹ Jerry Cooper, *The Rise of the National Guard: The Evolution of the American Militia, 1865-1920* (Lincoln, NE: University of Nebraska Press, 1997), 72.

¹² Cooper, *The Rise of the National Guard*, 96.

¹³ Ibid., 75.

¹⁴ John K. Mahon, *History of the Militia and the National Guard* (New York, NY: MacMillan Publishing, 1983), 114.

Missions

With the nation's large physical size, lack of enemies, and practice of rapid expansion in times of crisis, the Army, following the Civil War, concerned itself with its traditional roles as a frontier constabulary and providing for coastal defense. Most of the infantry and cavalry regiments were spread along the western wagon trails and rail lines to protect settlers and pacify Native American tribes.¹⁵ By 1897, the Army had largely won the Indian Wars and was consolidating its widely dispersed companies into regiment sized garrisons. The War of 1812 with Great Britain had emphasized the need to protect the coast and American shipping as well as prevent enemy expeditions from landing and utilizing ports which could serve as bases for further attacks.¹⁶ The Endicott Board, an investigative committee commissioned by Secretary of War William Endicott in 1886, reported that the coastal defenses were in poor condition and recommended improvements to the fortifications with new batteries and weapons. Congress only half-heartily supported plan, providing limited appropriations and a slow rearmament with rifled breach loading guns.¹⁷ The War Department administered the constabulary and coastal garrisons through eight geographic military departments. The military departments conveyed the orders of the War Department and maintained authority over the training, supply, health, and discipline of all troops assigned.¹⁸ The geographic military departments could assemble temporary field forces when necessary "but federal law forbade the maintenance in peacetime of any permanent troop formation larger than the regiment. When organized in wartime, armies, corps, and divisions

¹⁵ Allan R. Millett & Peter Maslowski, *For the Common Defense: A Military History of the United States from 1607 to 2012*, 3rd ed. (New York, NY: Free Press, 2012), 228.

¹⁶ Brian McAllister Linn, *The Echo of Battle: The Army's Way of War* (Cambridge, MA: Harvard University Press, 2007), 13.

¹⁷ Millett, *For the Common Defense*, 240.

¹⁸ Cosmas, *An Army for Empire*, 15.

could act either under a department commander or independently under direct orders from Washington.”¹⁹

The US Constitution and the Militia Act of 1792 codified the role of the National Guard as an instrument of the states. Congress could call the National Guard to federal service to “repel invasion, suppress insurrection, or enforce federal law.”²⁰ With the industrialization following the Civil War, tensions between the factory owners and organized labor reached a peak in the 1880s and 1890s. Governors regularly mobilized their National Guard units in police role for strike breaking and quelling civil disorder.²¹ Following the improvements of coastal defenses codified by the Endicott System in the 1880s, the National Guard’s mission for many states was expanded to include manning the batteries of coastal artillery.²² A debate grew by the 1890s on whether the National Guard was to be a reserve to the Regular Army and if it could “participate in offensive campaigns beyond the nation’s borders.”²³

Education

The Army began to professionalize following the Civil War. There were those that resisted efforts to improve the education and military skills of officers based on the ideals of Jacksonian egalitarianism which scorned “the growth of any social group based on specialized skills.”²⁴ A group of reformers led by Commanding General of the Army William Tecumseh Sherman and his protégé General Emory Upton in the 1870s began advocating improvements to

¹⁹ Cosmas, *An Army for Empire*, 15.

²⁰ Cooper, *The Rise of the National Guard*, 8.

²¹ Mahon, *History of the Militia and the National Guard*, 116.

²² Cosmas, *An Army for Empire*, 54.

²³ *Ibid.*, 12.

²⁴ Edward M. Coffman, *The Old Army: A Portrait of the American Army in Peacetime, 1784-1898* (New York, NY: Oxford University Press, 1988), 269.

Army education.²⁵ The US Military Academy at West Point had remained the principal institution for officer professional development since 1803 with a focus on civil engineering, tactics, and the preparation of a limited number of junior officers who attended to the technical aspects of the infantry, artillery, cavalry, and engineer branches.²⁶ Recognizing the need to expand the technical education of officers, the US Army established the Artillery School at Fort Monroe, Virginia in 1868 and the School of Application for Infantry and Cavalry at Fort Leavenworth, Kansas in 1881.²⁷ Commanding General of the Army John Schofield began a lyceum system for each regiment in the late 1880s in order to provide basic military instruction to junior officers at their duty locations since so few had attended West Point.²⁸ Officers also conducted self-study and began writing and debating through the journals of military professional associations such as the *Journal of the Military Service Institution of the United States* and the *Cavalry Journal*.²⁹

The US Army on the eve of the Spanish American War was structurally hollow with just 25,000 officers and men distributed to seventy-eight posts across the United States, the regiment as the largest formation allowed in peacetime, and the National Guard remaining poorly equipped and ill trained. The missions of the US Army were focused on its role as a frontier constabulary protecting settlers during the Indian Wars, defending key ports as a coastal defense force, and the National Guard remaining an instrument of the states and focused on quelling civil disorder. The educational system of the US Army lagged far behind its European counterparts with West Point as the principle officer education institution, a handful of branch schools providing technical

²⁵ Millett, *For the Common Defense*, 242.

²⁶ T. Harry Williams, *The History of American Wars from 1745 to 1918* (New York, NY: Alfred A Knopf, 1981), 139.

²⁷ Timothy K. Nenninger, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918* (Westport, CT: Greenwood Press, 1978), 21-22.

²⁸ Ibid., 34.

²⁹ Beaver, *Modernizing the American War Department*, 19.

education, and the lyceum system providing basic level instruction for those officers who did not attend West Point. The US Army was not prepared for the Spanish American War because the structure, missions, and educational system prevented the effective execution of operational art due to the lack of the mission command systems and the intellectual basis in the officer corps.

Part 2

The Spanish American War

The Spanish American War highlights the US Army's limited ability to manage complex organizations and conduct operational art. This is most evident as the US Army struggled to mobilize volunteer units and during V Corps operations in the Cuban Campaign. In contrast, the Philippine Campaign describes the modest success of the VIII Corps in the orderly equipping and embarkation of several self-contained subordinate commands and the subsequent Battle of Manila. The marginal performance of the US Army in commanding, controlling, planning, and coordinating operations during the Spanish American War is a turning point as it proved that it was not a fully modern fighting force.

As the Spanish American War began in late April 1898, the United States strategy was to liberate Cuba from the Spanish and limit the conflict by ending the war quickly.³⁰ The war itself was a manifestation of a reinterpreted Monroe Doctrine by both progressives and hawks in the US. In President Monroe's famous address on December 2, 1823 from which the doctrine is derived, he advocated that there would be no new colonization in the Americas by Europeans, there would be no transfer of existing colonies, and there would not be a re-imposition of colonial rule. Monroe delivered these remarks in what he saw as a narrow US interest to prevent European engagement in the new American republics and keep the Americas out of European politics. Latin

³⁰ David F. Trask, *The War with Spain in 1898* (New York, NY: MacMillan Publishing, 1981), 168.

America was not to be protected under a US security umbrella.³¹ But by 1898, the Monroe Doctrine had evolved due to the Industrial Age, focusing American foreign policy on protecting its trade interests, exporting the ideals of moral progressivism which promoted liberty and humanitarian intervention, and on creating a US sphere of influence over Latin America. The deaths of 266 US sailors in the unexplained sinking of the USS Maine on February 15, 1898 in Havana, Cuba solidified US public opinion against the Spanish and justified the demands for action by President McKinley, who utilized the Monroe Doctrine as precedent.³²

Mobilization of the Army

With tensions increasing between the United States and Spain, orders were sent to twenty-two Regular Army infantry regiments, six cavalry regiments, and four field artillery regiments on April 15 to begin concentrating in camps established at Chickamauga, Georgia; Tampa, Florida; New Orleans, Louisiana; and Mobile, Alabama.³³ Major General Nelson Miles, Commanding General of the Army, ordered Brigadier General William Shafter to assemble 6,000 regular troops at Tampa as the nucleus of the V Corps.³⁴ The War Department would ultimately designate seven corps to be established for both the regular troops and the mobilizing volunteers.³⁵

Adjutant General of the Army, Brigadier General Henry Corbin, established quotas for volunteers mobilizing from the National Guard into federal service according to each state's

³¹ Walter A. McDougall, *Promised Land, Crusader State: The American Encounter with the World Since 1776* (Boston, MA: Mariner Books, 1997), 71-73.

³² Millett, *For the Common Defense*, 252.

³³ Trask, *The War with Spain in 1898*, 151.

³⁴ Cosmas, *An Army for Empire*, 111.

³⁵ Frank Freidel, *The Splendid Little War* (Boston, MA: Little, Brown and Company, 1958), 34.

population.³⁶ Volunteer units were first assembled at state camps for basic drill, equipping, and physical examinations.³⁷ Large numbers of National Guardsmen failed their physical exams, forcing states to recruit new members in order to bring units to full strength.³⁸ Severe equipment shortages hampered the mobilization of the Volunteer regiments. The War Department struggled to provide uniforms, ammunition, and tentage from its meager prewar stockpiles. While the Regular units were equipped with the modern, smokeless powder Krag-Jorgensen rifle, the Volunteers were forced to utilize the black powder, breech-loading Springfield, which gave away the shooter's position when fired.³⁹ Recognizing the lack of readiness of the volunteer units, the War Department decided to muster most of the regiments at the larger federal camps where it would be more efficient to train, equip, and form units into brigades, divisions, and corps.⁴⁰ However, the federal camps lacked the administrative organizations and personnel to effectively mobilize the volunteers. In addition to the equipment shortages that persisted, filthy conditions caused serious epidemics of disease which debilitated thousands of men.⁴¹

In early April 1898, President McKinley called upon the joint Army-Navy War Board to develop a plan for defeating the Spanish. Everyone on the board "agreed that the American fleet should open the conflict by blockading the ports of Cuba."⁴² What McKinley and his advisors could not decide was whether, when, and where to attack the Spaniards on land. On April 4 the board proposed that the US Navy should blockade the ports of Cuba and Puerto Rico, preventing

³⁶ Trask, *The War with Spain in 1898*, 151.

³⁷ Mahon, *History of the Militia and the National Guard*, 128.

³⁸ Cooper, *The Rise of the National Guard*, 102.

³⁹ Williams, *The History of American Wars*, 326.

⁴⁰ Cosmas, *An Army for Empire*, 131.

⁴¹ Trask, *The War with Spain in 1898*, 160.

⁴² Cosmas, *An Army for Empire*, 103.

supplies and reinforcements from reaching the Spanish army and inviting the Spanish fleet to be defeated in a decisive battle, allowing the US Navy to control the Caribbean. The US Army's V Corps, commanded by newly promoted Major General Shafter and consisting mainly of Regular troops and mobilized volunteers, would land west of Havana, seize the protected port of Mariel to establish a base, and then conduct a siege of Havana, defeating the Spanish army and its supply base.⁴³

The Cuban Campaign

The Spanish fleet, desperately in need of coal, slipped past a US Navy squadron and entered the Santiago de Cuba harbor on May 19, but it was not confirmed by the Navy that the entire fleet was there until June 4 and a blockade of the port was established.⁴⁴ The plan for the Cuban Campaign undertook a major shift with the Spanish fleet now blockaded in Santiago. On May 31 General Shafter was ordered to ready the 25,000 troops of his command for departure to Cuba. It quickly became apparent that there would be a significant delay in the embarkation the expedition at Tampa as logistical issues overwhelmed the officers and units of V Corps. General Shafter learned on June 1 that the transport ships contracted by the Army could only hold 15,000 to 18,000 troops, not the 25,000 he was ordered to take.⁴⁵ The single railroad track between Tampa and the port caused a massive bottleneck and separated the units from their supplies.⁴⁶ Following Shafter's personal intervention into the loading of the ships and several days of hard

⁴³ Cosmas, *An Army for Empire*, 104.

⁴⁴ Freidel, *The Splendid Little War*, 51-52.

⁴⁵ R. A. Alger, *The Spanish-American War* (New York, NY: Harper & Brothers, 1901), 75.

⁴⁶ John D. Miley, *In Cuba With Shafter* (New York, NY: Scribner's and Sons, 1899), 22.

work, the ships were ready to sail on June 8. A false warning about a Spanish fleet in the area prevented the departure of V Corps until June 14.⁴⁷

After six days at sea, Shafter arrived off Santiago on June 20. Shafter's orders from the War Department specified that he capture the Spanish garrison at Santiago and assist the Navy against the Spanish fleet.⁴⁸ Shafter soon met with US Navy Rear Admiral William Sampson, commander of the naval forces blockading Cervera's squadron, and Cuban rebel General Calixto Garcia to coordinate operations for landing the V Corps. Despite Sampson's view that Shafter should assault the heights at the harbor entrance in order to neutralize the Spanish batteries at Morro Castle, Shafter decided to conduct the landing with the bulk of his forces at Daiquiri, seventeen miles east of Santiago. He would then march the V Corps northwest, along an inland jungle trail to the upper end of the bay, away from the strongest Cuban defenses.⁴⁹ Admiral Sampson agreed to shell the Cuban batteries at Santiago and at other locations along the coast in order to deceive the Spanish on the actual landing sites.⁵⁰ In addition, General Garcia's rebel troops would attack the Spanish troops in the landing area, protecting the V Corps as it transferred from the ships to shore and preventing the Spanish from reinforcing Santiago.⁵¹

The V Corps landed unopposed at Daiquiri on June 22 and 23 but quickly ran into problems. The bulk of the troops went ashore in small wooden boats and the wharf in the harbor limited the offloading of supplies because of its small size. There was little order to the system as only six thousand troops landed on the first day.⁵² V Corps consisted of two infantry divisions,

⁴⁷ Paul H. Carlson, "Pecos Bill: " A Military Biography of William R. Shafter (College Station, TX: Texas A&M University Press, 1989), 168-169.

⁴⁸ Alger, *The Spanish-American War*, 64.

⁴⁹ Freidel, *The Splendid Little War*, 77-78.

⁵⁰ Trask, *The War with Spain in 1898*, 204.

⁵¹ Millett, *For the Common Defense*, 263.

⁵² Carlson, "Pecos Bill," 173.

commanded by Brigadier Generals Jacob Kent and Henry Lawson, respectfully. In addition, it contained a dismounted cavalry division under Brigadier General Joseph Wheeler, an independent Brigade under Brigadier General John Bates, a battalion of light field artillery, two siege batteries and a Gatling-gun detachment. Based on the mobilization, the force was made up largely of regular troops, with just five volunteer regiments.⁵³ Shafter had few combat service support units such as engineers, medical corpsmen, and signal troops due to the limitations of the transport ships. With the ships only able to carry 2,295 horses and mules, Shafter prioritized those animals to his artillery and a few wagon train units.⁵⁴ As the troops moved inland at Daiquiri, the shortage of boats and barges to land supplies forced the troops to push the horses and mules overboard so that they could swim to shore.⁵⁵ Many of them became disoriented and drowned, which would amplify the effect on V Corps limited operational reach and depth.

Brigadier General Lawton's infantry division marched from Daiquiri to Siboney on the morning of June 23 and captured the town without a fight.⁵⁶ Shafter decided to make Siboney the V Corps base of operations and concentrated his forces around it.⁵⁷ It took more than four days to unload all the troops and supplies from the transport ships.⁵⁸ As the V Corps prepared for its march towards Santiago, 4,000 troops Cuban rebel General Garcia were transported by sea from their camps west of Santiago harbor and landed at Daiquiri and Siboney to augment Shafter's force.⁵⁹ The supply situation remained tenuous for V Corps because of the small pier at Siboney and the one steam lighter available to disembark supplies from the larger ships to shore. The

⁵³ Trask, *The War with Spain in 1898*, 216.

⁵⁴ Ibid., 190.

⁵⁵ Carlson, "Pecos Bill," 173.

⁵⁶ Freidel, *The Splendid Little War*, 92.

⁵⁷ Williams, *The History of American Wars*, 336.

⁵⁸ Carlson, "Pecos Bill," 173.

⁵⁹ Cosmas, *An Army for Empire*, 207.

roads were muddy and impassable by the wagons and most supplies had to be packed on mules to the units at the front. Shafter was forced to limit the supplies being brought ashore to ammunition, medical supplies, and rations and had difficulty in stockpiling more than one day's supply.⁶⁰ Engineer equipment and other supplies which could have been used to improve the roads and port facilities were left aboard the ships.⁶¹

Shafter conducted reconnaissance of the Spanish defenses and decided to conduct a penetration at the San Juan Heights. Shafter's plan was for two secondary attacks, at El Caney and Aguadores, in support of the main assault on Kettle Hill and San Juan Hill. At El Caney the 520 Spanish defenders, armed with repeating rifles, held off the Americans for nine hours.⁶² Lawton's division had a single battery of light artillery to reduce the stone walls of the El Viso fort where the majority of the Spanish defenders were located.⁶³ As the fighting wore on and there was little indication of the Spanish weakening, Lawton was forced to commit his reserve brigade in order to seize the town and fort.⁶⁴

The assaults on Kettle Hill and San Juan Hill were delayed several hours as Shafter futilely waited for General Lawton to seize El Caney. When the order was issued to attack, progress proved to be agonizingly slow.⁶⁵ The 71st New York Volunteer Regiment received heavy fire at the base of San Juan Hill from the Spanish defenders and was not able to continue forward.⁶⁶ The detachment of Gatling guns and a battery of light artillery were able to suppress the Spanish in their trenches and allowed General Kent's infantry division and General Wheeler's

⁶⁰ Millett, *For the Common Defense*, 263.

⁶¹ Cosmas, *An Army for Empire*, 211.

⁶² Williams, *The History of American Wars*, 337.

⁶³ Freidel, *The Splendid Little War*, 127.

⁶⁴ Trask, *The War with Spain in 1898*, 236.

⁶⁵ Ibid., 240.

⁶⁶ Mahon, *History of the Militia and the National Guard*, 130.

dismounted cavalry division to gradually climb the ridge.⁶⁷ By late in the afternoon the remaining Spanish had withdrawn from the San Juan Heights to their second line of defense along the edge of Santiago. Spanish General Linares was seriously wounded and command was passed to General Jose Toral.⁶⁸ The American troops quickly began fortifying their positions, reorganizing their units, and replenishing ammunition stocks, expecting a Spanish counterattack.⁶⁹ American losses for the day totaled approximately 1,100 troops killed and wounded and Shafter believed he had insufficient combat power to further attack the strengthening Spanish defenses around Santiago.⁷⁰

As General Shafter and Admiral Sampson debated on the next course of action, the Spanish fleet under Admiral Cervera departed Santiago harbor on the morning of July 3 for Cienfuegos, 350 miles to the west. The naval squadron under Commodore Winfield Schley destroyed the entire Spanish fleet and captured Admiral Cervera.⁷¹ Shafter, informing General Toral of the Spanish fleet's defeat, demanded the surrender of Santiago.⁷² General Toral, acting under orders from Governor-General Ramon Blanco in Havana refused, forcing Shafter to strengthen his positions along the San Juan Heights.⁷³ After intermittent shelling and peace negotiations which spanned until July 14, Toral finally offered to surrender the 23,500 troops under his command and the eastern district of Cuba.⁷⁴ A formal surrender ceremony took place in

⁶⁷ Cosmas, *An Army for Empire*, 214.

⁶⁸ Trask, *The War with Spain in 1898*, 244.

⁶⁹ Freidel, *The Splendid Little War*, 175.

⁷⁰ Williams, *The History of American Wars*, 337-338.

⁷¹ Carlson, "Pecos Bill," 179.

⁷² Millett, *For the Common Defense*, 266.

⁷³ Carlson, "Pecos Bill," 179.

⁷⁴ Freidel, *The Splendid Little War*, 254.

a field outside of Santiago on July 17.⁷⁵ With malaria and yellow fever beginning to ravage the men of V Corps, Shafter received approval from the War Department to evacuate his troops to Camp Wikoff, NY beginning on August 7. By October 3 the Cuban Campaign officially ended with all V Corps soldiers processed through Camp Wikoff and the unit formally disbanded.⁷⁶

The Philippine Campaign

With the declaration of war on April 25, the US Asiatic Squadron under Commodore George Dewey quickly set sail from a Chinese harbor outside Hong Kong and headed towards Manila.⁷⁷ The McKinley Administration determined that Dewey's squadron was to seek the limited objective of exerting pressure on Spain "at a weakly defended colonial outpost far distant from the Spanish Peninsula."⁷⁸ The plan developed by the Navy Department and transmitted to Dewey was to either attack or blockade Manila.⁷⁹ Dewey intended for his squadron to seize a base for future operations and ensure that Spain did not pose a threat to American commerce in the Pacific.⁸⁰

In the early morning of May 1 Dewey's squadron quickly passed the Spanish batteries defending Manila Bay, destroyed the Spanish ships at anchor and silenced the shore batteries.⁸¹ Dewey did not have any Army troops to capture Manila nor could he continue a blockade indefinitely. There were no ports which he could access for resupply in the Far East under international law therefore he would be forced to withdraw to the US and anger the US public as

⁷⁵ Cosmas, *An Army for Empire*, 229-230.

⁷⁶ Trask, *The War with Spain in 1898*, 333-334.

⁷⁷ O'Toole, *The Spanish War*, 174.

⁷⁸ Trask, *The War with Spain in 1898*, 93.

⁷⁹ Ibid., 92.

⁸⁰ Ibid., 93.

⁸¹ Trask, *The War with Spain in 1898*, 102-103.

his victory would be seen as worthless.⁸² On May 2, Dewey sent a Marine detachment to occupy the Cavite arsenal 27 miles from Manila by road and sent a request to Washington for 5,000 troops to help control the islands.⁸³

Admiral Dewey's request for troops caused the McKinley administration to mobilize an additional expedition to Manila. Major General Wesley Merritt was selected by McKinley to command the newly formed VIII Corps in San Francisco.⁸⁴ The second most senior general in the army, Merritt was West Point educated and had commanded divisions in the Civil War, giving him experience in administering and maneuvering large formations.⁸⁵ Merritt quickly determined that the 5,000 troops requested by Dewey were insufficient to conquer "territory 7,000 miles from our base, defended by a regularly trained and acclimated army of 10,000 to 25,000 men, and inhabited by 14,000,000 people, the majority of whom will regard us with intense hatred born of race and religion."⁸⁶ Following Merritt's requests for more troops, General Miles stated that the expedition was "not expected to carry on a war to conquer an extensive territory," its purpose being simply to provide "a strong garrison to command the harbor of Manila, and to relieve the United States fleet under Admiral Dewey with the least possible delay."⁸⁷

Merritt was assisted in forming his expedition by Brigadier General Henry C. Merriam, Commander of the Department of California and his assistant, Brigadier General Elwell S. Otis. Merriam utilized his own staff to support the coordination necessary to house, train, and equip the

⁸² Williams, *The History of American Wars*, 340.

⁸³ James C. Bradford, *Crucible of Empire: The Spanish-American War & Its Aftermath* (Annapolis, MD: Naval Institute Press, 1993), 135.

⁸⁴ Millett, *For the Common Defense*, 267.

⁸⁵ Cosmas, *An Army for Empire*, 199.

⁸⁶ Trask, *The War with Spain in 1898*, 384.

⁸⁷ *Ibid.*, 384.

largely volunteer force. Otis was tasked with the chartering and fitting out of the transport ships.⁸⁸ Merritt realized that his force would have to sail to Manila in several different groups because of the limited number of ships that could be assembled. He sent out each detachment as a “self-contained command with its own complement of staff and medical personnel.”⁸⁹ The orderly embarkation of troops commenced with the first contingent of 2,500 under Brigadier General Thomas M. Anderson departing 25 May from San Francisco on three ships and escorted by the cruiser the USS Charleston.⁹⁰

Merritt was ordered not to cooperate with the 12,000 Philippine insurgents under Emilio Aguinaldo conducting a siege of Manila or recognize their goal of independence.⁹¹ Merritt was able to convince the Filipino unit in front of the Corps to evacuate and place American troops in the trenches facing the Spanish without providing any pledges or assistance to the Filipino insurgency.⁹² Seeing that the Americans had replaced the Filipinos, the Spanish attacked killing ten American soldiers and wounding another forty-three.⁹³ Several more skirmishes occurred over the following nights causing five more American soldiers to be killed and ten wounded.⁹⁴

During the first week of August, after rejecting several surrender demands by Dewey, the Spanish commander in Manila, Governor General Don Fermin Jaudenes, entered into secret negotiations with the Merritt and Dewey through the Belgian consul Edouard Andre. Jaudenes realized the hopelessness of his situation and agreed to surrender to the Americans and not the

⁸⁸ Cosmas, *An Army for Empire*, 200.

⁸⁹ Ibid., 200.

⁹⁰ Millett, *For the Common Defense*, 267.

⁹¹ Williams, *The History of American Wars*, 341.

⁹² Alger, *The Spanish-American War*, 333.

⁹³ Ibid., 334.

⁹⁴ O'Toole, *The Spanish War*, 369.

Filipinos, who he feared would commit avenging atrocities on his troops.⁹⁵ Jaudenes negotiated to surrender following a mock battle which would save his reputation and Spain's honor. The Americans agreed that they would not bombard Manila and they would keep the Philippine insurgents under Aguinaldo out of the city.⁹⁶

The battle began on the morning of 13 August at 9:35 A.M with a naval bombardment by Dewey on Fort San Antonio, the southwestern anchor of the Spanish defenses.⁹⁷ After nearly an hour, the naval gunfire ended and VIII Corps attacked and quickly seized the fort. As the Corps continued its attack and moved through the suburbs to the city gates, Jaudenes hoisted his surrender flag at 11:30 A.M. but the Spanish troops opposing the American attack did not see it and fighting continued until approximately 1:30 P.M.⁹⁸ Even though Dewey, Merritt, and Jaudenes knew it to be a mock battle, the American losses were six dead and forty-three wounded.⁹⁹

As the Americans began disarming the Spanish troops, Aguinaldo's forces began entering the suburbs of Manila between the walled city and Camp Dewey to the south. The American troops quickly oriented themselves against the Filipino insurgents in order to prevent them moving any further into the city. Merritt sent a message to Aguinaldo telling him to have his troops return to their positions outside the city, by which Aguinaldo reluctantly complied but relations between both sides further soured.¹⁰⁰ News of the peace agreement, which was reached

⁹⁵ Williams, *The History of American Wars*, 341.

⁹⁶ Millett, *For the Common Defense*, 267.

⁹⁷ O'Toole, *The Spanish War*, 370.

⁹⁸ Cosmas, *An Army for Empire*, 241.

⁹⁹ O'Toole, *The Spanish War*, 371.

¹⁰⁰ O'Toole, *The Spanish War*, 371.

in Washington on 12 August, did not reach Manila until 16 August when the telegraph cable to Hong Kong was repaired.¹⁰¹

Following negotiations in Paris that spanned from 3 October to 10 December, the Spanish American War official ended with a signed treaty which granted Cuban independence, the cession of the Philippines, Puerto Rico and Guam to the United States, and the payment of \$20 million by the United States to Spain as compensation for acquiring the Philippines.¹⁰² While the war was clearly a victory for the United States and proved it was becoming a global power, the war was not without a price. The Army had quickly grown to 274,717 troops by September 1898 but fighting in Cuba and the Philippines had cost the lives of 365 men to combat action and another 2,565 to disease and other noncombat related deaths.¹⁰³

President McKinley, aware of the issues surrounding the War Department and Army in the war with Spain, and attempting to quiet public anger, commissioned an investigation in September 1898.¹⁰⁴ Former general and railroad tycoon Grenville Dodge headed the commission of former military officers.¹⁰⁵ The commission interviewed 450 individuals, inspected the mobilization camps and examined the military departments and bureaus of the War Department.¹⁰⁶ The commission published the report of its findings on February 9, 1899 and

¹⁰¹ Trask, *The War with Spain in 1898*, 421.

¹⁰² Ibid., 466.

¹⁰³ O'Toole, *The Spanish War*, 375.

¹⁰⁴ Russell F. Weigley, *History of the United States Army* (New York, NY: MacMillan Publishing, 1967), 310.

¹⁰⁵ Millett, *For the Common Defense*, 292.

¹⁰⁶ Grenville M. Dodge, James A. Sexton, and Charles Denby, *Report of the Commission Appointed by the President to Investigate the Conduct of the War Department in the War with Spain* (Washington, DC: Government Printing Office, 1900), accessed July 10, 2014, <https://archive.org/details/conductwarddept02dodgrich>, 5-6.

determined that the War Department was not guilty of deliberate negligence or corruption.¹⁰⁷ They did however, find that “there was lacking in the general administration of the War Department during the continuance of the war with Spain that complete grasp of the situation which was essential to the highest efficiency and discipline of the Army.”¹⁰⁸ Dodge and the other commissioners believed that “intelligent planning and proper management” could have prevented many of the issues surrounding the mobilization.¹⁰⁹ The commission recommended improvements to the Army organization and that the War Department “reduce paper work, stockpile necessary supplies, and develop schools of instruction to train personnel properly for wartime duty and ensure a supply of competent officers.”¹¹⁰ The Dodge Commission report had many critics due to the implied sympathy it showed to the War Department but it provided the foundation for reform following President McKinley’s request for Secretary Alger’s resignation in August 1899.¹¹¹

The US Army’s performance during the Spanish American War highlighted issues in its ability to command, control, plan, and coordinate operations. The US Army lacked a mobilization plan and struggled to equip and train volunteers at mobilization camps. The changing strategy and objectives on the part of the McKinley Administration prevented V Corps the ability to conduct campaign planning prior to departing for Cuba. The confused embarkation of troops in Tampa for the Cuban Campaign was the result of the small and overwhelmed V Corps staff. The lack of organization in Tampa further manifested itself during the disorganized unloading at Daiquiri and Siboney, causing critical combat service support capabilities and supplies to remain onboard the

¹⁰⁷ Cosmas, *An Army for Empire*, 295.

¹⁰⁸ Dodge, *Report of the Commission*, 12.

¹⁰⁹ Cosmas, *An Army for Empire*, 295.

¹¹⁰ Trask, *The War with Spain in 1898*, 485.

¹¹¹ Millett, *For the Common Defense*, 271.

ships. The Battle of San Juan Heights illustrates the V Corps staff's inability to support the commander in the thoughtful planning, synchronization, and supervision of the subordinate divisions. The Philippine Campaign however, demonstrates the ability of field staffs to manage operations with Merritt's use of Department of California staff to lead the orderly equipping and embarkation of the self-contained subordinate commands to the Philippines. This was further evident during the Battle of Manila where the VIII Corps was able to coordinate naval gunfire and simultaneous brigade attacks into the city. Once the city was secured from the Spanish defenders, the VIII Corps troops were quickly oriented to prevent Filipino insurgents entering the city. The events of the Spanish American War highlighted the need to transform the field staffs from advisors to the commander, to a managerial organization which could plan, synchronize, and supervise of the tactical actions of subordinate units in time, space, and purpose, to achieve strategic objectives.

Part 3

The Root Era Reforms

Elihu Root became the new Secretary of War following the departure of Alger and during the rising negative public opinion on the McKinley Administration's conduct of the Spanish American War.¹¹² Root was tasked primarily for developing the colonial organization and administration for the newly acquired territories.¹¹³ In addition, he was to recommend organizational changes which would prevent the repeat of the issues identified in the Dodge Commission report and to modernize the Army towards those of the advanced European states.¹¹⁴ A successful lawyer and rising star in New York state politics, Root was experienced in drafting

¹¹² Beaver, *Modernizing the American War Department*, 30.

¹¹³ Philip C. Jessup, *Elihu Root* (New York, NY: Dodd, Mead & Company, 1938), 220.

¹¹⁴ Williams, *The History of American Wars*, 352.

and pushing through legislation, a skill that would prove invaluable later on as he authored many of the bills to Congress authorizing changes to the Army.¹¹⁵

As Root began his reform movement, he found the War Department plagued by inefficiencies and corruption.¹¹⁶ The War Department was hampered by the autonomous bureau chiefs, who acted as advisors to the Secretary of War, but each had its own budget and oversight through Congress, and thereby held enormous power.¹¹⁷ While the President exercised his constitutional powers as the Commander-in-Chief, the Commanding General of the Army controlled the regiments and the eight geographical military departments and passed along all orders from the President and Secretary of War.¹¹⁸ Root began to realize the accuracy of the Dodge Commission Report, which stated that the problems of the Spanish American War “lay in command, control, planning, and coordination” and that the “nineteenth-century command-and-control system had reached the limits of its capacity.”¹¹⁹

The principal example of the limits of the Army’s command-and-control system during the Spanish American War was the confusion at the V Corps port of embarkation in Tampa, Florida, which was due to the lack of qualified staff officers. Staff organization during the Spanish American War fell under the Army Regulations of 1861 and was largely unchanged since the American Revolution.¹²⁰ The Army lacked both a mobilization plan and the permanent organization of brigades, divisions, and corps and therefore the regular and volunteer army could

¹¹⁵ Jessup, *Elihu Root*, 220.

¹¹⁶ *Ibid.*, 220.

¹¹⁷ James E. Hewes Jr., *From Root to McNamara: Army Organization and Administration, 1900-1963* (Washington, DC: United States Army Center of Military History, 1975), 3.

¹¹⁸ Cosmas, *An Army for Empire*, 15.

¹¹⁹ Beaver, *Modernizing the American War Department*, 30.

¹²⁰ James D. Hittle, *The Military Staff: Its History and Development* (Westport, CT: Greenwood Press, 1975), 189.

be gathered together and then transported to Cuba only with great difficulty.¹²¹ Years later, Root remarked in *The Annual Report of the Secretary of War for the Year 1902* that the confusion at the ports in Tampa was due to the lack of officers who were to make “intelligent and effective execution of command possible by keeping all the separate agents advised of the parts they are to play in the general scheme...”¹²²

Root determined that the structure of the army needed to be systematically reformed through its educational system, which would increase the professionalism of the officer corps in order to improve the management of a progressively more complex modern army. It was a holistic approach, in which Root integrated ideas from the British, Prussian, and French militaries, as well as the advocates for reform from within the US Army. Root found assistance for his reform efforts in the Adjutant General, Brigadier General Henry C. Corbin, and Assistant Adjutant General, Major William H. Carter. Corbin distinguished himself when Commanding General Nelson A. Miles left Washington, abdicating his role in coordinating the Army efforts in Cuba and the Philippines to Corbin, so that he could personally lead the Puerto Rican campaign.¹²³ Root began an intensive study of the writings of those who had called for Army reform following the Civil War, with a focus on the officer corps as a professional body, improving its education, and its role in managing formations larger than battalions.

Professionalism

Root took advantage of the Army’s history of officers publishing books and articles on military subjects since before the Civil War to understand the profession. One of the writings which influenced officers was that of former Commanding General of the Army Henry W.

¹²¹ Russell F. Weigley, *Towards an American Army: Military Thought from Washington to Marshall* (Westport, CT: Greenwood Press, 1974), 148.

¹²² Hittle, *The Military Staff*, 203.

¹²³ Beaver, *Modernizing the American War Department*, 26-27.

Halleck. His 1846 book, *Elements of Military Art and Science*, stated that military officers are professionals in the same sense as any other professional body, such as lawyers or doctors.¹²⁴ Despite America's history of a citizen-based army, it made no sense to Halleck that civilians could be entrusted with the professional duties of a military officer.¹²⁵ Major Carter introduced Root to the writings of Colonel Emory Upton, providing him a copy of Upton's book *The Armies of Asia and Europe* and his unpublished manuscript *Military Policy*.¹²⁶ Upton advocated a professional army over civilians-in-arms by proposing that the regular Army should be designated as the sole agency responsible for national defense, instead of the state controlled militias, and that a reserve system be implemented, much like what Upton observed during his travels to Germany.¹²⁷ Root was also influenced by British writer Spenser Wilkinson, in his book, *The Brain of an Army*, in which Wilkinson detailed the Prussian military and stated that officer professionalism is the basis of the army as an institution and is its intellectual center.¹²⁸

Throughout the nineteenth century the officer corps evolved to contain an auxiliary of specialists beyond those of the infantry, cavalry, and artillery branches. Groups of officers specialized in fields such as engineering, logistics, ordinance, and maintained their own unique set of skills and knowledge. The military borrowed many of the same attributes of civilian professions as the increasingly industrial army required technical specialists.¹²⁹ Frederick W.

¹²⁴ H. Wagner Halleck, *Elements of Military Art and Science: Course of Instruction in Strategy, Fortification, Tactics of Battles*, 3rd ed. (New York, NY: D. Appleton & Co, 1862), 28.

¹²⁵ George S. Pappas, *Prudens Futuri: The U.S. Army War College 1901-1967* (Carlisle Barracks, PA: Walsworth, 1967), 7.

¹²⁶ Weigley, *History of the US Army*, 315.

¹²⁷ Stephen E. Ambrose, *Upton and the Army*, Reprint ed. (Ann Arbor, MI: University Microfilms International, 1980), 108.

¹²⁸ Spenser Wilkinson, *The Brain of an Army: a Popular Account of the German General Staff* (Westminster, UK: Archibald Constable, 1895), 97.

¹²⁹ Morris Janowitz, *The Professional Soldier, a Social and Political Portrait* (New York, NY: Free Press, 1971), 9.

Taylor's concept of Scientific Management was the basis of many reforms in the military and the new field of public administration with the focus on details and looking for efficiencies through time and motion studies.¹³⁰ The military officer profession therefore was an institutional creation which began after the army developed its own specialized techniques, standards, values, and organization.¹³¹ There were threats to the American military profession as the legacy of the mid-nineteenth century Jeffersonian hostility towards a standing army, and the Jacksonian skepticism of a professional and elite body of officers which could threaten the popular government and principle of civilian control, had restricted its growth.¹³² Despite its small size and limited resources, the American officer corps placed emphasis on sharing knowledge by writing in professional journals and membership in professional associations.¹³³ The officer corps overcame challenges, borrowed from civilian professions and academia in developing specialized education, and established a level of autonomy and authority to define itself as an independent profession.¹³⁴

Education

Root believed that a well-organized educational system was necessary for officers to become better managers of the increasingly complex industrial army. The experience of the Spanish American War resulted in the knowledge that all ranks of officers required some level of increased education, but since Root could not send the generals to school, he had to start with

¹³⁰ Hewes, *From Root to McNamara*, 18.

¹³¹ Samuel P. Huntington, *The Soldier and the State: the Theory and Politics of Civil-Military Relations* (Cambridge, MA: Belknap Press, 1981), 19.

¹³² *Ibid.*, 224.

¹³³ Matheny, *Carrying the War to the Enemy*, 18.

¹³⁴ Abrahamson, *America Arms for a New Century*, 34.

junior officers.¹³⁵ Root agreed with Halleck's emphasis on a system of military instruction devoted to the study of military art and science.¹³⁶ General Sherman had also believed in a complete system of education which began at West Point in instructing cadets with the liberal education that any professional required along with the indoctrination of military values and discipline essential in a professional military officer.¹³⁷ Sherman resurrected the Army's advanced schools following the Civil War for the technical training of engineers at Willet's Point, New York in 1866, artillery at Fort Monroe in 1868, infantry and cavalry at Fort Leavenworth in 1881, and cavalry and light artillery at Fort Riley in 1887.¹³⁸ As the complexity and depth of knowledge which was contributing to military art and science increased through the writings of military professionals in the nineteenth century, West Point reduced the amount of technical training in its curriculum in order to allow the advanced schools to educate officers in the specialized knowledge for their profession.¹³⁹

The Infantry and Cavalry School at Fort Leavenworth began largely as a branch school for the education of junior officers, but through imaginative instructors such as Colonel Arthur Wagner and Captain Eben Swift, it soon became the only location devoted to the higher study of the art of war prior to the Spanish American War.¹⁴⁰ As with the lyceums, the school was suspended because of the war, but Root reopened the school as the General Service and Staff College and expanded its charter in War Department General Order 155 in November 1901.¹⁴¹

¹³⁵ Palmer, *America in Arms*, 127.

¹³⁶ Pappas, *Prudens Futuri*, 7.

¹³⁷ Huntington, *The Soldier and the State*, 231.

¹³⁸ Pappas, *Prudens Futuri*, 7.

¹³⁹ Huntington, *The Soldier and the State*, 239.

¹⁴⁰ *Ibid.*, 240.

¹⁴¹ Henry Shindler, *History of the Army Service Schools* (Fort Leavenworth, KS: Staff College Press, 1908), 17.

The General Service and Staff College was organized into two separate schools known as The School of the Line and The Staff College.¹⁴² The School of the Line was designed as a first-year course for all branches of service, focused on tactical instruction and the application of principles derived largely from translated German textbooks.¹⁴³ The Staff College was a second-year course which would take only the best graduates from School of the Line for instruction on staff duties at the operational level. It focused on military history, logistics, naval warfare, geography, and students conducted staff rides of Civil War campaigns.¹⁴⁴ The other advanced schools soon followed the General Service and Staff College in method of instruction as well as in content by adjusting their curriculum to generalist education, with an emphasis on staff work.¹⁴⁵ Under the leadership of Brigadier General J. Franklin Bell, the General Service and Staff College was soon the Army's most important Service School because of its high standards and quality instruction, which prepared officers for future command and staff assignments.¹⁴⁶

Secretary Root's study of Upton, Wilkinson, Prussian General Bronsart von Schellendorff, and conversations with Carter, retired General Schofield, Brigadier General Ludlow, and others convinced him that a General Staff was necessary. Commanding General Miles, Brigadier General Ainsworth, and the various bureau chiefs within the War Department objected to the creation of a General Staff which forced Root to seek a Congressional authorization and to create a War College with general staff functions and powers as a temporary measure.¹⁴⁷ In 1900 the War College Board was established in order to reform the Army's educational system, but Root soon tasked the officers assigned with developing and advocating a

¹⁴² Ibid., 19.

¹⁴³ Coffman, *The Regulars*, 178.

¹⁴⁴ Nenninger, *The Leavenworth Schools and the Old Army*, 72-73.

¹⁴⁵ Ibid., 58.

¹⁴⁶ Weigley, *History of the US Army*, 325-326.

¹⁴⁷ Pappas, *Prudens Futuri*, 13-14.

general staff concepts.¹⁴⁸ Root persisted in his attempts to establish a General Staff by authoring legislation which copied the specific general staff functions from Schellendorff's book, *Duties of the General Staff*, serving as the basis for the General Staff Act of 1903.¹⁴⁹ The Act replaced the office of the Commanding General with the office of the Chief of Staff, who would have supervision over the staff bureaus within the War Department, as part of the General Staff.¹⁵⁰ The establishment of the General Staff allowed the War College to focus on its role instructing officers on higher-level professional military studies.¹⁵¹ Designed in the Prussian tradition, the War College was to educate officers for duty on the General Staff.¹⁵² Root specifically tasked the War College to "study and confer on the great problems of national defense, of military science, and of responsible command."¹⁵³ The development of the War College was the foundation for the reform and modernization of the War Department through the General Staff.

The development of the General Service and Staff College at Fort Leavenworth in 1901, and the Army War College in Washington, DC in 1903 was instrumental in the professionalization of the US Army following the Spanish American War. US Army officers at these post-graduate level schools studied the ideas of their European counterparts and the maneuvering of large formations in a theater for decisive battle.¹⁵⁴ The educational system allowed for officers to rapidly solve problems, understand campaigns, organize troops for grand

¹⁴⁸ Millett, *For the Common Defense*, 293.

¹⁴⁹ Hittle, *The Military Staff*, 204.

¹⁵⁰ Harry P. Ball, *Of Responsible Command: A History of the U.S. Army War College* (Carlisle Barracks, PA: Alumni Association of the U.S. Army War College, 1983), 75.

¹⁵¹ Pappas, *Prudens Futuri*, 35.

¹⁵² Paul Bronsart Von Schellendorff, *The Duties of the General Staff*, Tr. by W.A.H. Hare (London, UK: C. Kegan Paul & Co, 1877), 49.

¹⁵³ Ball, *Of Responsible Command*, 80.

¹⁵⁴ Matheny, *Carrying the War to the Enemy*, 21.

tactical movements, and command.¹⁵⁵ Root's efforts to revise the Army's educational system provided educated and competent staff officers for divisions and higher units.¹⁵⁶

Management

The Spanish American War illuminated the shortcomings in the Army's antiquated system of command and control at the corps and division levels. Not since the American Civil War had the Army fielded corps and division sized units and these larger, more complex organizations, employing many different specialties, required enhanced command and control systems in order to coordinate and direct their subordinate formations to their assigned goals.¹⁵⁷ Competent staffs were crucial to moving, sustaining, and coordinating large armies in the practice of modern operational art.¹⁵⁸ Root again looked to officers such as Carter, Schellendorff, Upton, and Swift to provide the framework for reforming the management of the Army.

The new industrial society which emerged in the nineteenth century attempted to understand and control the variables that constituted the environment. Proponents of the popular Scientific Management theory sought to organize individuals into highly coordinated and regimented work forces through the creation of managerial structures capable of studying that environment, devising plans, and coordinating the organization's efforts.¹⁵⁹ As control migrated through the managerial structures, the managers increasingly dominated their organizations.¹⁶⁰ There was also the rejection of the idea of "military genius" as the individualism and

¹⁵⁵ Pappas, *Prudens Futuri*, 66.

¹⁵⁶ Palmer, *America in Arms*, 127.

¹⁵⁷ Huntington, *The Soldier and the State*, 32.

¹⁵⁸ Matheny, *Carrying the War to the Enemy*, 19.

¹⁵⁹ Abrahamson, *America Arms for a New Century*, 34-35.

¹⁶⁰ Abrahamson, *America Arms for a New Century*, 35.

unpredictability of some commanders had become irresponsible.¹⁶¹ Even for commanders who were deemed competent professionals, it was seen that no matter what his intellectual abilities and leadership, he was not solely able to efficiently manage all the functions of a large formation.¹⁶² The Spanish American War demonstrated the weaknesses of commanders and the inefficiency of the ad hoc and small staffs.

The evolution of the staff was the result of military managers such as Root attempting to develop organizational forms appropriate to the expanding complexity of military action.¹⁶³ Schellendorff observed that the increasing complication of modern armies was due to the size and changing requirements, which required higher level commanders to have a regular staff of specially selected and trained officers.¹⁶⁴ Clausewitz also stated that the staff is “intended to convert the ideas of the general commanding into orders not only by conveying the former to the troops, but far more by working out all the necessary matters of detail, thus relieving the mind of the general from a great amount of unnecessary trouble.”¹⁶⁵ The field staffs improved efficiency through the collection of technical information, knowledge of the duties assigned, and the application of that knowledge toward the management of organization.

For most of the Army’s history, organizations above the regimental level were only created during times of war because the small Army was spread over a vast area and field staffs were not required.¹⁶⁶ During the Civil War, staffs began to emerge at the brigade and division levels but were largely made up of several aides de camp, an adjutant general, a surgeon, an

¹⁶¹ Carol Ann Reardon, *The Study of Military History and the Growth of Professionalism in the U.S. Army before World War I* (Ann Arbor, MI: University Microfilms International, 1987), 3.

¹⁶² Huntington, *The Soldier and the State*, 12-13.

¹⁶³ Janowitz, *The Professional Soldier*, 26.

¹⁶⁴ Matheny, *Carrying the War to the Enemy*, 19.

¹⁶⁵ Schellendorff, *The Duties of the General Staff*, 4.

¹⁶⁶ Carter, *The American Army*, 74.

inspector general, a quartermaster, and a commissary officer.¹⁶⁷ The general and his aides de camp developed the strategy and determined the tactics.¹⁶⁸ The adjutant general was responsible for writing out the orders for the command.¹⁶⁹ The only functions that required planning and control were the logistical activities.¹⁷⁰ The staff was not required to develop plans or synchronize all activities in support of military operations.

The Civil War did not cause an evolution in the staff because despite technological advances in weaponry, infantry and cavalry tactics remained largely unchanged.¹⁷¹ It was during the late nineteenth century that US Army officers realized that as larger units were fielded, and the specialty branches, such as field artillery and engineers, became more technical in nature, the need to synchronize formations, maneuver, and firepower increased.¹⁷² In addition, the increased lethality of the battlefield required the abandonment of massed regimental formations moving in close order, and instead attack formations were spread out to utilize terrain as cover.¹⁷³ These new techniques made it difficult for commanders to maneuver and direct the fire of their subordinates with voice and instrumental commands.¹⁷⁴ The staff was required to support the commander by synchronizing and controlling the actions of subordinate units. The role of the staff officer therefore evolved from solely being an advisor to the commander to one in which the staff

¹⁶⁷ John J. McGrath, *The Brigade: A History* (Fort Leavenworth, KS: Combat Studies Institute Press, 2004), 19.

¹⁶⁸ Huntington, *The Soldier and the State*, 26.

¹⁶⁹ John B. Wilson, *Maneuver and Firepower: The Evolution of Divisions and Separate Brigades* (Washington, DC: U.S. Army Center of Military History, 1999), 17.

¹⁷⁰ Huntington, *The Soldier and the State*, 26.

¹⁷¹ McGrath, *The Brigade*, 26.

¹⁷² Richard S. Faulkner, *The School of Hard Knocks: Combat Leadership in the American Expeditionary Forces* (College Station, TX: Texas A&M University Press, 2012), 267.

¹⁷³ Ibid., 18.

¹⁷⁴ Faulkner, *The School of Hard Knocks*, 18.

assessed the performance of subordinates and supervised their actions.¹⁷⁵ During the Spanish American War, the US Army had not codified the changing role of the staff officer; therefore, the US Army followed the precedents established in the Civil War for role of the staff at the division and corps level.¹⁷⁶

The most important aspect of Root's reform movement in improving the management of the Army was his ability to modify the staff from a purely advisory role, to one in which staff officers planned and supervised the actions of subordinate units. Root began this shift by advocating for the establishment of a General Staff. A General Staff, based largely on the German *Grosse Generalstab*, would align the various bureaus within the War Department under a chief of staff who reported directly to the Secretary of War.¹⁷⁷ The General Staff attempted to correct the issues related to the lack of intelligence and collaborative planning within the War Department during the Spanish American War. Root believed one of the main faults was that general and field officers had been overly occupied in the details of administration and not in the formation of plans for contingencies.¹⁷⁸ Root also abolished the practice of permanently assigning officers to the War Department. The detail system allowed for the alternating employment in line and staff duties, along with rotations to assignments overseas, "enlarged the horizons of all officers and qualified them for administration and command in the higher grades to a degree impossible under the old conditions."¹⁷⁹ The creation of the General Staff had a ripple effect on the Army's units in the field as officers who trained at the War College, and gained valuable experience on the General Staff, rotated back to their regiments from Washington.¹⁸⁰

¹⁷⁵ Janowitz, *The Professional Soldier*, 67-68.

¹⁷⁶ McGrath, *The Brigade*, 25.

¹⁷⁷ Millett, *For the Common Defense*, 294.

¹⁷⁸ Pappas, *Prudens Futuri*, 22.

¹⁷⁹ Carter, *The American Army*, 78.

The US Army codified the progress of the Root era reforms when it published the Field Service Regulations in 1905. The Field Service Regulations provided the doctrinal framework for the organization and operation of units in the field as well as instruction at US Army's schools.¹⁸¹ There were several significant changes to how the Army was to operate as the division replaced the corps as the basis for US Army organization.¹⁸² While not permanently standing units, in the field divisions became both tactical and administrative units. "Matters relating to courts martial, supply, money, property accountability, and administration, all normally vested in a department commander during peace, passed to the division commander during war."¹⁸³

To carry out these duties, the division staff was expanded to include a chief of staff, an adjutant general, an inspector general, a provost marshal, a judge advocate, a surgeon, and a quartermaster, along with commissary, engineer, signal, ordnance, and muster officers.¹⁸⁴ "In units larger than a brigade, and in separate forces commanded by a general officer, the staff service is under the supervision of an officer of the general staff designated as *chief of staff*."¹⁸⁵ The role of the chief of staff in field units was designed to have a considerable degree of independence in order to organize and supervise the operation of all staff sections, regulate the details of the orders, advise the general, and bring matters which require his attention.¹⁸⁶

Part 4

Maneuvers

¹⁸⁰ Hittle, *The Military Staff*, 205.

¹⁸¹ Nenninger, *The Leavenworth Schools and the Old Army*, 93.

¹⁸² Field Service Regulations (FSR): United States Army, 1905, Amended 1908 (Washington, DC: Government Printing Office, 1908), 13.

¹⁸³ Wilson, *Maneuver and Firepower*, 24-25.

¹⁸⁴ FSR 1905, 14.

¹⁸⁵ Ibid., 14.

¹⁸⁶ FSR 1905, 15.

The growing professionalism of the officer corps, improvements to the military educational system, and adoption of modern military management techniques during the Root era was beginning to positively change the performance of Army units. One of the long held views by many officers within the US Army however, was that the system of training needed to go beyond the classroom and the tactical movement of small units, and should culminate in large-scale maneuvers which closely replicated actual war. The purpose of large scale maneuvers was to exercise combined arms in concert, allow senior officers to inspect the abilities of their troops, and train commanders and staffs.¹⁸⁷ Maneuvers allowed officers to apply their knowledge through the planning and mobilization of their units, conduct combined arms training, and gain valuable command experience and skills which would prove useful in later wars.

Combined arms maneuvers had been part of the curriculum at Fort Leavenworth since 1881 but were limited to the size of a regiment as the US Army's many small posts, spread across the country, did not allow for the concentration of forces.¹⁸⁸ Following the Spanish American War there were efforts to close many of the smaller posts in order to consolidate regiments and improve training, but Congressmen were reluctant to move troops and close bases in their home districts.¹⁸⁹ Fort Leavenworth was the largest post following the Spanish American War being that it had a complete infantry regiment, field artillery batteries, and cavalry troops.¹⁹⁰

Camp Root Maneuvers

Root became an advocate of large maneuvers and authorized the establishment of a provisional maneuver division under Major General John C. Bates at Camp Root, Fort Riley,

¹⁸⁷ Wilkinson, *The Brain of an Army*, 109-110.

¹⁸⁸ Wilson, *Maneuver and Firepower*, 25.

¹⁸⁹ Millett, *For the Common Defense*, 297.

¹⁹⁰ Abrahamson, *America Arms for a New Century*, 88.

Kansas in the fall of 1902.¹⁹¹ Colonel Arthur L. Wagner served as the chief umpire for the maneuvers and stated that the maneuvers were an attempt to replicate the maneuvers of European armies but because of a lack of forces and training area, the units had to operate as parts of larger, imaginary armies.¹⁹² Units were sent to Fort Riley by train from Fort DA Russell, WY; Fort Logan, CO; Fort Leavenworth, KS; Fort Reno, OK; and Fort Roots, AR.¹⁹³ They consisted of three regular army infantry regiments, one cavalry regiment, five batteries of field artillery, one battalion of engineers, signal and hospital units. The National Guards of Kansas and Nebraska each provided two additional regiments of infantry.¹⁹⁴ The division staff reflected the ad hoc organizations of the Spanish American War and consisted of an adjutant general, inspector general, chief quartermaster, chief commissary, chief surgeon, chief signal officer, and several aides de camp, all of which would go back to their units as soon as the maneuvers ended.¹⁹⁵ The maneuvers were the largest in the history of the US Army, consisting of drills and several field problems over the course of nineteen days.¹⁹⁶ Wagner believed that the maneuvers were beneficial and worth the cost as officers participating in the exercises learned a great deal more than in academic settings.¹⁹⁷ Despite the success in getting such a large force together for training, the maneuvers at Camp Root did highlight the lack of preparedness by the National

¹⁹¹ Ibid., 87.

¹⁹² Arthur L. Wagner, *Report of Colonel Arthur L. Wagner* (Kansas City, MO: Hudson-Kimberly Publishing Co, 1902), accessed 11 March 2015, <http://cdm16635.contentdm.oclc.org/cdm/ref/collection/p16635coll14/id/53978>, 72.

¹⁹³ J. H. Dockweiler, *Report on Maneuver Division Camp Root, Fort Riley, Kansas* (Sacramento, CA: State of California Press, 1903), accessed March 10, 2015, <https://archive.org/details/reportonmaneuve00caligoog>, 25.

¹⁹⁴ Ibid., 4.

¹⁹⁵ Ibid., 4-5.

¹⁹⁶ Dockweiler, *Report on Maneuver Division Camp Root*, 7.

¹⁹⁷ Wagner, *Report of Colonel Arthur L. Wagner*, 72.

Guard for field duty and the need for further instruction for National Guard officers during summer encampments.¹⁹⁸

The Army continued to hold maneuvers following Camp Root. The first joint Army-Navy maneuvers were in 1902 along Long Island Sound where an Army division-sized unit and several navy ships tested the adequacy of the coastal defenses. This was replicated in subsequent years several times at different locations on both the Atlantic and Pacific Coasts.¹⁹⁹ Following the Dick Act of 1903, the National Guard had to conform to federal standards and conduct maneuvers and camps of instruction with the regular Army.²⁰⁰ The first truly large-scale maneuvers took place at Manassas, Virginia in 1904 as 26,000 men from regular army regiments and National Guard units trained together.²⁰¹

The impact of the maneuvers was not felt in just the units participating. The Staff College at Fort Leavenworth facilitated the training of officers for maneuvers as part of the curriculum with students developing mobilization plans involving a large number of troops spread over great distances. The students were required to write the order in which troops were to move, determine the number of trains required, the routes and schedules for the trains, and account for the supplies needed for each division.²⁰² The graduates of the Staff College provided the staffs of field units a common language, techniques for problem solving, and the intellectual basis for applying their knowledge towards the complexity of planning maneuvers.

Updated in 1910, the Field Service Regulations increased the size and capability of the divisions while removing the corps and adding the field army. The division staff was realigned to

¹⁹⁸ Cooper, *The Rise of the National Guard*, 140.

¹⁹⁹ Abrahamson, *America Arms for a New Century*, 87.

²⁰⁰ Coffman, *The Regulars*, 191.

²⁰¹ Wilson, *Maneuver and Firepower*, 25.

²⁰² Nenninger, *The Leavenworth Schools and the Old Army*, 101.

include a chief of staff, an assistant chief of staff, an adjutant general, an inspector general, a judge advocate, a quartermaster, a commissary officer, a surgeon, the commander's three aides, and six civilian clerks.²⁰³ Engineer and signal battalion commanders joined it at the discretion of the division commander. The provost marshal was eliminated, as were the ordnance, muster, and senior artillery officer, with most of these positions moving to the field army headquarters.²⁰⁴ In addition to the chief quartermaster, the division staff was augmented with a quartermaster section which included four majors or captains, four quartermaster-sergeants, six civilian veterinarians, and civilian clerks. The commissary section was also created with three majors or captains, four commissary sergeants, and four civilian clerks.²⁰⁵ While not a standing organization, and requiring personnel to be pulled from subordinate regiments and the military departments, the new division organization was designed to be powerful, self-sufficient, and with a staff able to supervise independent operations.

The Maneuver Division

The Mexican Revolution in 1911 raised concerns in the US government about security along the southern border. In March 1911, the War Department ordered 13,000 troops to assemble at San Antonio, Texas, as the "Maneuver Division" in order to prepare for possible offensive operations against Mexico.²⁰⁶ Additional brigades were formed at Galveston, Texas, and San Diego, California in order to protect against a potential attack by the Mexican Navy.²⁰⁷

²⁰³ Field Service Regulations (FSR): United States Army, 1910 (Washington, DC: Government Printing Office, 1910), 15.

²⁰⁴ Wilson, *Maneuver and Firepower*, 30.

²⁰⁵ FSR 1910, 30.

²⁰⁶ Weigley, *History of the United States Army*, 334.

²⁰⁷ Wilson, *Maneuver and Firepower*, 30.

Troops in the division maneuvered, went on long marches, lived in tent camps for several months, and tested new equipment.²⁰⁸ Officers such as Captain John M. Palmer, a brigade staff officer in the Maneuver Division, took advantage of the time in San Antonio by focusing on small scale tactical field problems and integrating the brigade staff in the planning and supervision of the exercises.²⁰⁹ Despite the improvements in planning by the War Department and the adoption of the 1910 FSR, the Maneuver Division was poorly organized, took more than ninety days to assemble, and remained understrength despite the addition of thousands of recruits.²¹⁰ The division and its subordinate brigades were disbanded in August of 1911 as tensions along the border eased.

A review of the Maneuver Division's performance and national defense policies by the General Staff was initiated by Secretary of War Henry L. Stimson in late 1911. The report, titled "The Organization of the Land Forces of the United States," also known as the Stimson Plan, advocated the regular army should be organized in divisions and brigades.²¹¹ It also sought a federally sponsored reserve system which trained citizen-soldiers in peacetime as the existing policy of mobilizing volunteers required significant amounts of time for training.²¹² Due to Congressional reluctance to legislate reforms, the General Staff developed plans to mobilize units into four regular army divisions and several separate brigades.²¹³ When Mexican President Francisco Madero was deposed and killed during a coup d'état led by General Victoriano Huerta in February 1913, the 2nd Division, under Major General William H. Carter, was mobilized at

²⁰⁸ Coffman, *The Regulars*, 160.

²⁰⁹ Nenninger, *The Leavenworth Schools and the Old Army*, 115.

²¹⁰ Millett, *For the Common Defense*, 294.

²¹¹ Wilson, *Maneuver and Firepower*, 31.

²¹² Millett, *For the Common Defense*, 305.

²¹³ Wilson, *Maneuver and Firepower*, 31.

Galveston and Texas City, Texas in order to prevent the violence in Mexico spilling across the southern United States border.²¹⁴

2nd Division Mobilizes

The mobilization of the 2nd Division was the first stage in War Plan Green, the General Staff plan against Mexico which included an overland campaign from Vera Cruz to Mexico City.²¹⁵ Unlike the numerous orders which were sent by the War Department to mobilize the Maneuver Division in 1911, Secretary of War Stimson sent just a single five line order to deploy the various units assigned to the 2nd Division.²¹⁶ The 2nd Division continued to conduct drills and extensive field maneuvers for over a year under the direction of division training officer Captain Hugh Drum.²¹⁷ In late April 1914, the US Navy and Marines occupied Vera Cruz in response to the arrest of eight sailors in Tampico, Mexico and to prevent a shipment of arms from Germany reaching the Huerta regime.²¹⁸ The 5th Brigade, under Brigadier General Frederick Funston, quickly deployed with 4,000 troops from Galveston to occupy Vera Cruz with 3,000 additional Marines until Huerta relinquished the Presidency to Venustiano Carranza in November 1914.²¹⁹ The 2nd Division remained at Texas City and Galveston until a hurricane hit the area in August 1915, causing extensive damage and killing thirteen soldiers, causing the War Department to demobilize the Division headquarters and move units to other posts in the Southern

²¹⁴ Ronald Glenn Machoian, *William Harding Carter and the American Army: A Soldier's Story* (Norman, OK: University of Oklahoma Press, 2006), 255.

²¹⁵ Millett, *For the Common Defense*, 302.

²¹⁶ Weigley, *History of the United States Army*, 335.

²¹⁷ Nenniger, *The Leavenworth Schools and the Old Army*, 115.

²¹⁸ John S. D. Eisenhower, *Intervention! The United States and the Mexican Revolution, 1913-1917*, 2nd ed. (New York: W. W. Norton & Company, 1995), 109.

²¹⁹ Coffman, *The Regulars*, 195.

Department.²²⁰ The 2nd Division was beginning to show the results of the Root era reforms as it had quickly and efficiently mobilized, trained thousands of soldiers for offensive operations, and rapidly deployed and supported a brigade in Vera Cruz during its two years and seven months of existence.

Pershing's Punitive Expedition

The occupation of Vera Cruz and the policies of President Woodrow Wilson, which supported Mexican President Carranza, caused revolutionary Francisco "Pancho" Villa to raid Columbus, NM on March 9, 1916, killing fifteen civilians and soldiers.²²¹ Brigadier General John J. Pershing was tasked by Major General Funston to organize a provisional division and disperse Villa's army in Mexico so that it could no longer threaten the southern United States.²²² Consisting of two cavalry brigades and one infantry brigade, Pershing pursued Villa's army deep into northern Mexico.²²³

Following additional raids by Villa's men along the Texas border in May and June 1916 and Carranza's troops threatening Pershing's division, President Wilson moved 48,000 regular troops to the southern border and mobilized and additional 111,000 National Guardsmen.²²⁴ The National Guard continued to have problems with the mobilization because of a lack of supplies as well as understrength and poorly trained units.²²⁵ Pershing had dispersed Villa's mounted

²²⁰ Wilson, *Maneuver and Firepower*, 34.

²²¹ Weigley, *History of the United States Army*, 347.

²²² Joseph A. Stout Jr, *Border Conflict: Villistas, Carrancistas, and the Punitive Expedition, 1915-1920* (Fort Worth, TX: Texas Christian University Press, 1999), 43-44.

²²³ Eisenhower, *Intervention!*, 236.

²²⁴ Coffman, *The Regulars*, 199.

²²⁵ Wilson, *Maneuver and Firepower*, 36.

columns and as the threat of war decreased with Mexico but rose with Germany, the expedition returned to the United States in February of 1917.²²⁶

The maneuvers and mobilizations highlighted the weaknesses in the US Army's preparation for war but it provided a training opportunity for the regular army and National Guard, a rehearsal for the movement of large amounts of troops and supplies, an opportunity to test the usefulness of new technology such as trucks and aircraft, and field experience to soldiers and staffs in harsh conditions. The maneuvers became the capstone events to the US Army's training and education system allowing for the integration of combined and supporting arms. The expeditions by Funston's brigade to Vera Cruz in 1914 and Pershing's provisional division to northern Mexico in 1916 provided valuable experience for the mobilization of the American Expeditionary Force to travel overseas to Europe in the spring of 1917.

Conclusion

The US Army on the eve of the Spanish American War reflected its experience from the US Civil War and its role as a frontier constabulary and a coastal defense force. The US Army remained under resourced throughout the nineteenth century and its capabilities were far behind its European counterparts. The US Army's structure, missions, and educational system did not reflect the increasingly industrial nature of modern western warfare. With the regiment as the largest peacetime formation, and the wars against the Native American tribes not requiring the practice of operational art, the US Army possessed only a few aging officers from the Civil War with the experience of commanding brigades, divisions, and corps. The US Army did not have a plan, or the structure, to mobilize and equip an expeditionary combat force.

The declaration of war against Spain in April 1898 caught the US Army largely by surprise. There were no plans for the mobilization of the tens of thousands of volunteers required

²²⁶ Millett, *For the Common Defense*, 303.

to conduct the war. The issues at the mobilization camps reflected the US Army's limited ability to manage the complexity of multi-division corps, consisting of both regular and volunteer regiments. The disorder in embarking V Corps troops at Tampa in June 1898 was only corrected through the personal intervention of Major General Shafter. The confusion continued with the landing of V Corps at Daiquiri and Siboney, Cuba. In contrast, Major General Merritt experience leading large formations during the Civil War, and his use of the Department of California's staff in preparing and embarking troops, allowed the VIII Corps to transit to the Philippines in an orderly fashion. Both the V Corps and VIII Corps were able to defeat Spanish forces, but the issues encountered during the war highlighted the need to reform the War Department and the US Army.

The reforms enacted by Secretary of War Root following the Spanish American War sought to rectify the issues of command, control, planning, and coordination. The Army was growing more complex as it reflected the increasingly industrial nature of warfare. Root and the reform minded officers in the US Army sought to increase the professionalism of the officer corps through the expansion of the Army educational system, leading to improved management of Army formations in the field. The expansion of staffs was crucial to assisting the commander in synchronizing and controlling the movement and sustainment of subordinate units and the employment of the various technical branches. The field staffs improved efficiency through the collection of technical information, knowledge of the duties assigned, and the application of that knowledge toward the management of organization.

Despite the improvements in the professionalism and education of the officer corps, and the expansion of the staff in Army field units, Root and many officers believed that the system of training needed to culminate with large-scale maneuvers which closely replicated actual war. The maneuvers allowed commanders and staffs to plan operations, practice the utilization of combined arms in combat scenarios, and inspect the combat readiness of their subordinate units. The maneuvers held at Camp Root in 1902, the mobilization of the Maneuver Division in 1911,

the mobilization of the 2nd Division and the deployment of the 5th Brigade to Vera Cruz in 1913, and General Pershing's Punitive Expedition in 1916, all highlighted challenges but more importantly allowed for the modernization of the US Army through valuable experiences and the increase in military capabilities. It was the Root era reforms at the turn of the twentieth century which created the modern US Army, allowing for it to be intellectually prepared and possessing the systems necessary for the execution of operational art in World War I.

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